



State of Montana Project Management Office

Project Initiation and Planning Phase

Project Statement of Work Instructions

This is one approach to documenting high-level project objectives and key parameters in a concise document. This document should be only about two pages long.

Expressing project drivers concisely, early on, is important to making sure the full team and all stakeholders understand and agree upon the reasons for doing the project, what the project will produce, and various important constraints and assumptions. Such a document should be done before detailed requirements specs are written.

1. The project manager can draft a Statement of Work (SOW) that the team then reviews and edits, or the project manager can meet with the core cross-functional team and brainstorm the sections together to create a first draft.
2. In the first draft, some items may be left blank if the team does not have the information yet. Or, if items are uncertain, the team can write in their initial information, but mark it as being an open issue. This latter approach is useful for keeping the team focused on resolving questions.
3. Update the SOW as the team proceeds through investigation and planning work. If scope, schedule or resource tradeoffs are made during this time, the SOW should be updated.
4. Have a signoff meeting where the team and major stakeholders officially confirm that this Statement of Work reflects the high-level plan of the project.
5. Keep the SOW visible during design reviews and project status reviews to ensure that individual functional work is staying true to what the SOW calls for.

Administrative Information

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